Maintaining Person-Centered Care: A Guide to Telehealth Etiquette

Telehealth capabilities and regulations have been expanded as a response to the rapidly evolving COVID-19 pandemic. As a result, many practices that have historically provided in-person services are adopting a telehealth model to ensure their patients are receiving the best care possible during this time.

Although there may be some similarities and benefits, aspects of telehealth visits differ greatly from in-person visits that may impact the clinician-patient relationship. Clinicians and patients may already come into a telehealth visit with an assumption that a telehealth visit is depersonalizing. Thus, being cognizant of the differences in delivery of telehealth visits compared to in-person visits and practicing proper telehealth etiquette is crucial to person-centered health care. The purpose of this guide is to provide some helpful tips on telehealth etiquette to guarantee a positive experience for both the clinician and the patient.

It is important to approach a patient’s telehealth visit experience in a comprehensive manner; from the time they schedule the appointment to any follow-up that happens after the telehealth visit has finished. There may be specific considerations for the pre-visit and post-visit experience that your practice will need to determine as you shift to virtual visits. Some of these considerations are listed on page 5.
Preparing for the Visit
Conducting a telehealth visit requires more forethought and preparation as compared to an in-person visit. Clinicians must be more conscientious about their professional appearance and the setting in which they conduct their virtual visit to convey that they value and respect their patient’s time. Regardless of how familiar a clinician is with conducting telehealth visits, it is imperative to methodically review one’s physical appearance, physical environment and technological equipment before every visit.

Physical Presentation
- Ensure appropriate, professional clothing
- Wear a lab coat if appropriate
- Ensure name badge or name is visible on the screen

Physical Environment
- Limit desk and room clutter - items like the patient chart and notepad for taking notes is fine
- Consider how and where you will document during the visit and if additional screens or monitors are needed to facilitate both face-to-face connection and typing
- Minimize potential distractions
- Select a secured room to ensure patient privacy
- Adjust lighting so that your face is illuminated
- Set your device on a firm surface to eliminate shaking or jiggling of your image

Technological Equipment
- Ensure the camera is positioned appropriately so that you are within the frame
- Ensure the microphone and audio settings are working
- Check that your internet connection is stable and you have alternatives if your internet connection becomes unstable
- Ensure you have alternative power source and outlets in case of unforeseen issues
Patient Engagement

Telehealth visits can present barriers to patient engagement, such as a clinician or patient’s preconceptions of telehealth visits as compared to in-person visits. It can be very powerful to have the clinician normalize feelings of ambivalence with utilizing telehealth and reassuring the patient of the confidentiality of their visit. Taking the time to explain and answer questions regarding the unique telehealth process can also ease concerns a patient may have, which will also help in establishing rapport with the patient, especially if the patient is unfamiliar to the clinician.

Greeting the Patient

- If a new patient:
  - Introduce yourself, your role, and the organization or department
  - Have the patient introduce themselves and anyone else that may be with them (e.g. caregiver, family member)
  - Establish rapport, brief informal talk to engage patient
  - Ensure both sides have adequate audio and video
  - Check to make sure the patient is in a quiet place to ensure their privacy

Explain the Telehealth Process

- Acknowledge and normalize the telehealth process (e.g. taking time to verify video and microphone are working)
- Explain when you may break eye contact to take notes, review charts, etc.
- Empower patients to clarify or have you repeat something said to ensure understanding
- Reassure the patient regarding utilizing HIPAA-compliant telehealth service and conducting the visit in a secured room

Patient Consent

- Verbally confirm and document in the patient's medical chart that patient acknowledges and consents to telehealth services and accepts that there may be a charge for this service and co-pays and deductibles may apply
Communication Considerations
Due to inherent comfort levels with in-person interactions, person-centered care and patient engagement are often more easily conveyed in in-person visits. Although they already ensure their verbal communication is clear and concise during in-person visits, clinicians will need to be more vigilant about their non-verbal body language to normalize the telehealth visit as much as possible and ensure patient engagement.

**Verbal Communication**
- Enunciate your words clearly
- Practice clarity, reducing the use of medical jargon without explaining terminology
- Ensure you repeat back what the patient said to ensure shared understanding of the patient’s concerns and your recommendations
- Allow ample pause, about 5-10 seconds or longer depending on patient characteristics (e.g. hard of hearing), for the patient to digest what you say and ask questions

**Non-Verbal Language**
- Emphasize positive non-verbal cues (e.g. head nodding, leaning forward) to affirm that you are engaged
- Limit amount of hand gesturing, fidgeting, or negative body language (e.g. crossed arms)
- Use of visual aides, such as drawing a graphic or diagram, to explain a topic or show a patient a report while emphasizing that they understand that this may be limited
- Maintain eye-contact (ensure camera is well-positioned) as much as possible when speaking and listening to patient
- Interpreter - be clear on your plans for engagement of an interpreter if it is needed and practice ahead of time
Additional Considerations Regarding the Logistics of the Medical Visit

Your patient will have questions about how they receive care that is usually done in-person. Make sure you walk through the process with your office staff ahead of time and ensure they can explain processes for usual care. This will make your patient feel confident that this service is equally valuable to your in-person visits.

Understand the process your office has for virtual visits for co-pays, vitals, check in questions, rescheduling visits, handling referrals, prescriptions, samples and discount prescription coupons so that you can communicate those to the patient.

Be able to explain to the patient how they will get their vaccine or lab draw if you order them during the telehealth visit and how they will get the results.

Know the capacities of your electronic health record portal for follow up for educational material and visit summaries with new medication lists.

Additional Resources

- **Telehealth Etiquette Video Series** – South Central Telehealth Resource Center.  
  [https://learntelehealth.org/telehealth-etiquette-series/](https://learntelehealth.org/telehealth-etiquette-series/)
References


